Journyx App v3.0

Journyx App User Manual

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Table of Contents

Overview 2
Introduction 2
System Requirements 2
Installation and Setup 3
Note for Journyx Administrators: Punch In/Out Time Setup 5
Using App Features 6
Using My Time 7
Using My Expenses and My Custom Entry 12
Using Punch In/Out 12
Using Refresh Data 12

Overview

Introduction

The Journyx app for mobile time and expense entry allows you to connect to your Journyx site and manage your timesheets, expenses and custom entry. Version 3.0 of the Journyx app includes options for end users to get their information entered and submitted for approval. Journyx will continue to improve and expand the app to include more time entry features and manager approvals. If you have a specific feature request for the Journyx app, please add it to the Journyx UserVoice site: journyx.uservoice.com

System Requirements

1. The Journyx app connects to your Journyx site. Your Journyx site must be running one of the following versions: **8.9m1, 9.1m1 or 9.5m1**. In addition to the required versions, you must also **apply a patch for mobile updates**. If Journyx hosts your site in the cloud, your site already includes the necessary updates for mobile app compatibility.

2. Your Journyx site must be **available to your mobile device like any other web page**. If your site is only accessible when you are connected to an internal network, you may need to work with your IT Department for VPN access for the mobile app when you don't have access to your internal resources.

3. Your login account must include either **time entry, my assignments, expense entry or custom entry** in order to access Journyx via the mobile app.

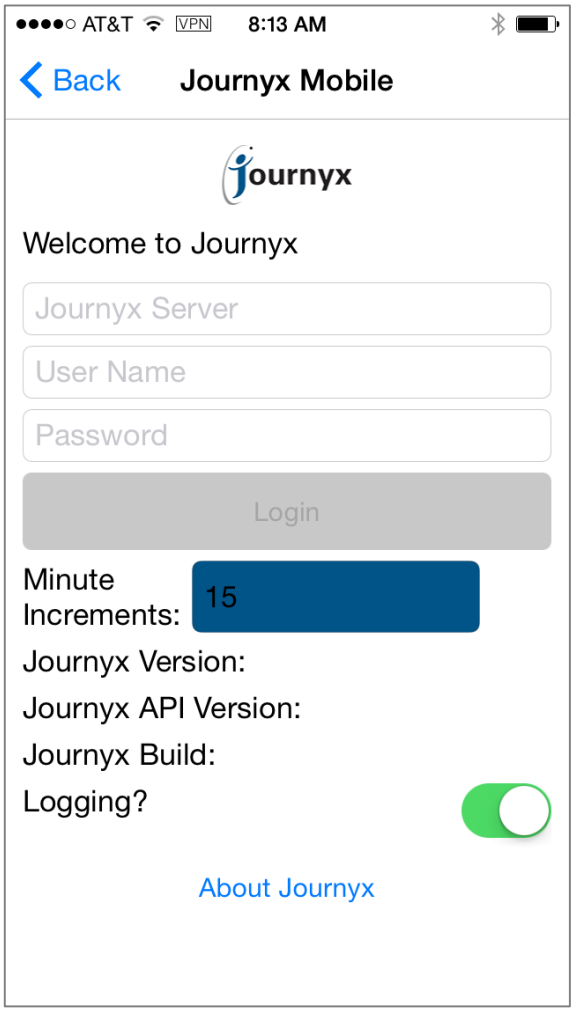
4. The minimum version for **iOS is 7.x**. The minimum version for **Android is 4.0.3**.

Installation and Setup

Installation of the Journyx app works like any other mobile app. Simply locate the app in the App Store or Google Play from your device and install it. Search for the keyword "journyx" to locate it quickly. The app is free. While the Journyx app for iOS is not optimized for the iPad, it will run on the iPad without issue. When you search for the Journyx app in the App Store on an iPad, you will need to change the search options from "iPad only" to "iPhone only" in order to find and install the Journyx app.

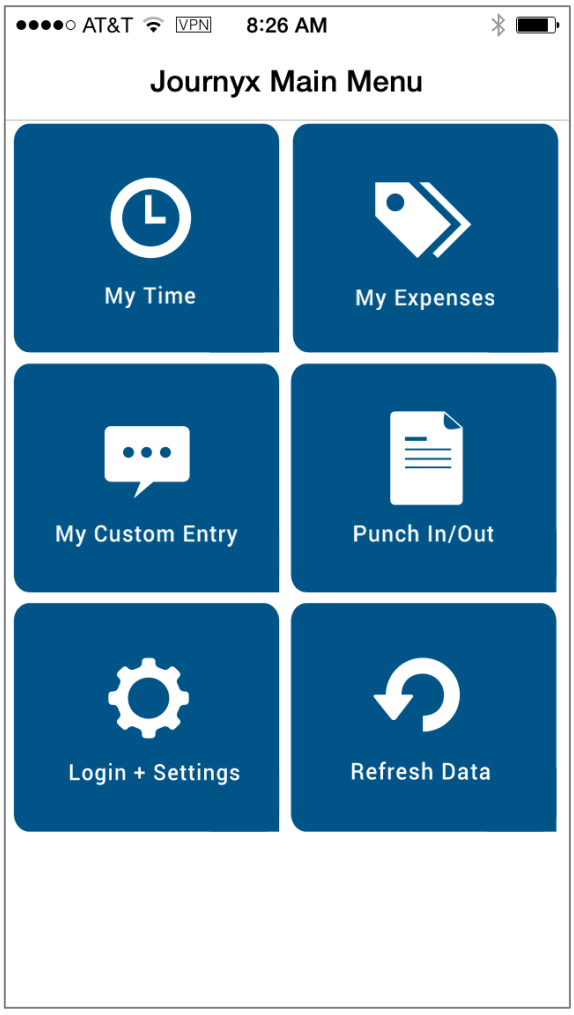
The first time you click on the Journyx app image, you will be asked to confirm that you want logging turned on. You do not have to enable logging, but the logging feature allows Journyx to better assist you when you need app support. If you opt to turn it off, you can turn it on later should you require support.

After you set your logging option, you will be directed to the Login and Settings screen. You will enter your Journyx connection and login information on this screen. You will not be able to use the app features until you have filled in the Journyx Server, User Name and Password fields successfully. The Minute Increments setting allows you to control how detailed your time entries will be. Journyx recommends 15 minute increments for easy time entry.



You do not need to enter the "http://" or "https://" from your Journyx Server address. You will simply enter "mysitename.com" where mysitename is replaced with the address for your server. If your server address includes a port number (e.g., mysitename.com:8080), you will enter the port number along with the address.

After you have successfully entered your Journyx site connection information, click on Login. If there are problems with your login information, the app will notify you. Otherwise, it will notify you that it is loading your projects and settings. The first time you load your Journyx information, it may take up to 2 minutes. When loading is complete, it will redirect you to the Home screen.



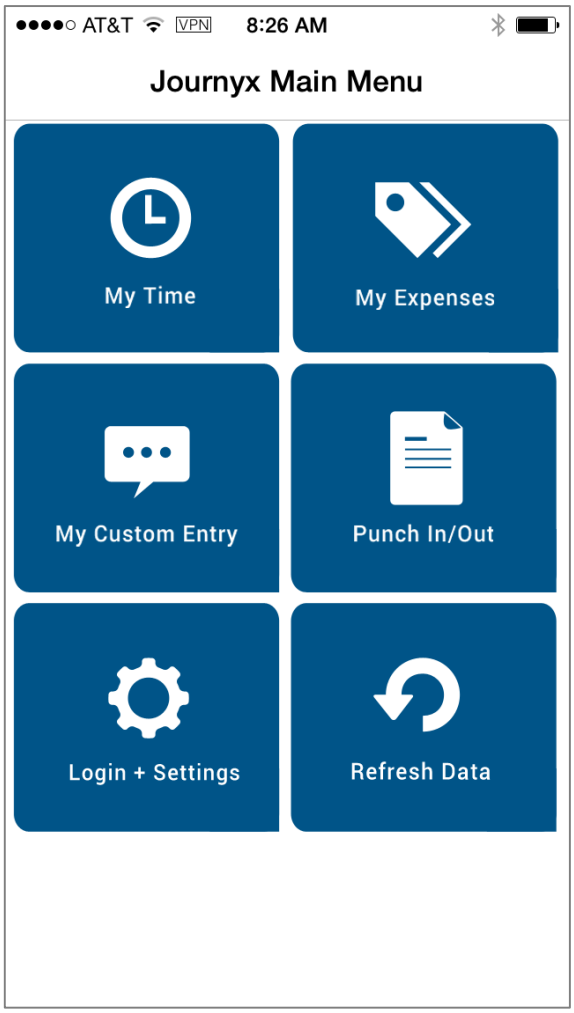
Note for Journyx Administrators: Punch In/Out Time Setup

Journyx Administrators can give individual users access to track in and out times using the mobile app. These in and out times are populated in the "allocation" type time entry screens. There are 2 configuration requirements for giving users access to track in and out times in the mobile app: 1. The user must be assigned to an "allocation" type time entry screen in the Journyx system. You can read more about allocation entry screens under Configuration→Entry Screens→Time Entry Screens while logged into the Journyx system via browser. 2. The user must have the "Mobile UI Type" custom field set to either "Punch" or "Punch or Grid".

In order to give users access to the punch button for in and out time tracking in the mobile app, a Journyx Administrator must first go to Configuration→Custom Fields and set up a User Custom Field by the name of "Mobile UI Type". This field must be a select list, and it must contain the following values: "Grid", "Punch" and "Punch or Grid". Users with the "Grid" value will not have the option to track in and out times in the mobile app. Users with the "Punch" value will only be able to track in and out times. They will no longer have access to the "My Timesheet" and "Time by Project" screens for detailed time entry. Users with "Punch or Grid" will have the option to track in and out times, as well as enter detailed time via "My Timesheet" and "Time by Project" screens.

Using App Features

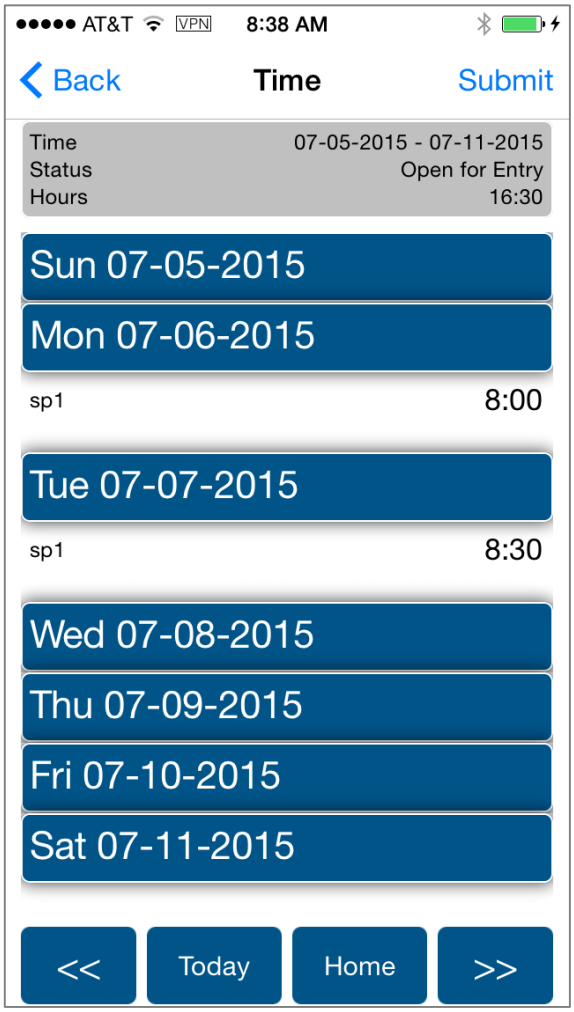
The Journyx app Home screen provides access to all of the features of the app. While you can see all of the possible options, you may not have access to use them all. For example, you may only have access to enter time and expenses. In this case, you will receive notice that Custom Entry and Punch In/Out are not available when you click on them.



The My Time button allows you to track time and shows a list of days in the current period as your starting point. The My Expenses and MY Custom Entry buttons show similar information for the respective entry type. The Punch In/Out button tracks in and out times based on the time on your device clock when you click the In/Out buttons. The Login + Settings button allows you to change your login information and settings. The Refresh Data button allows you to pull new information from the Journyx server (e.g., new projects that have been added for you).

Using My Time

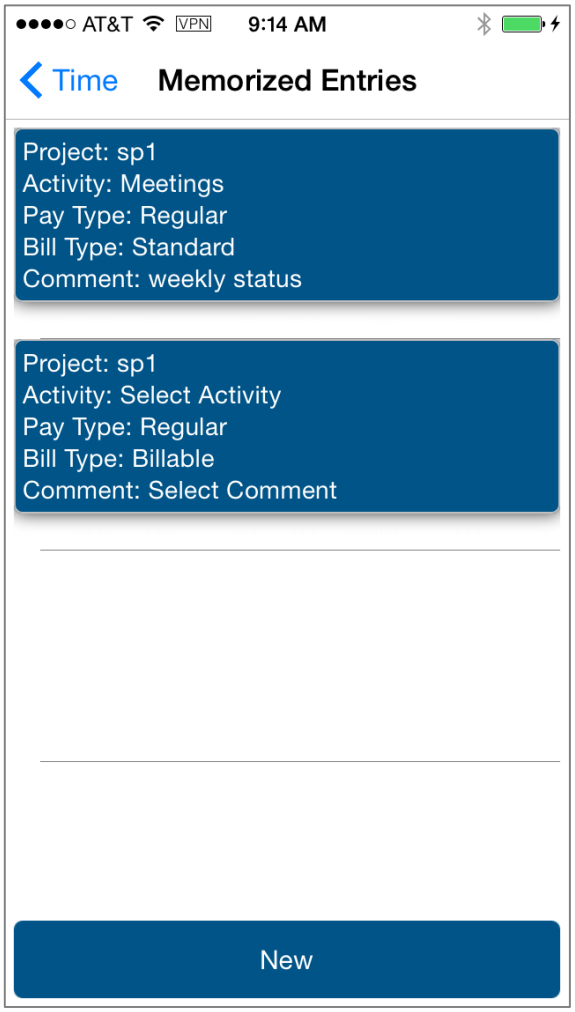
When you click on the My Time button, you will see a screen with a list of days for the current period. If you have time entered for any of those days, your existing entries will be summarized under each date.



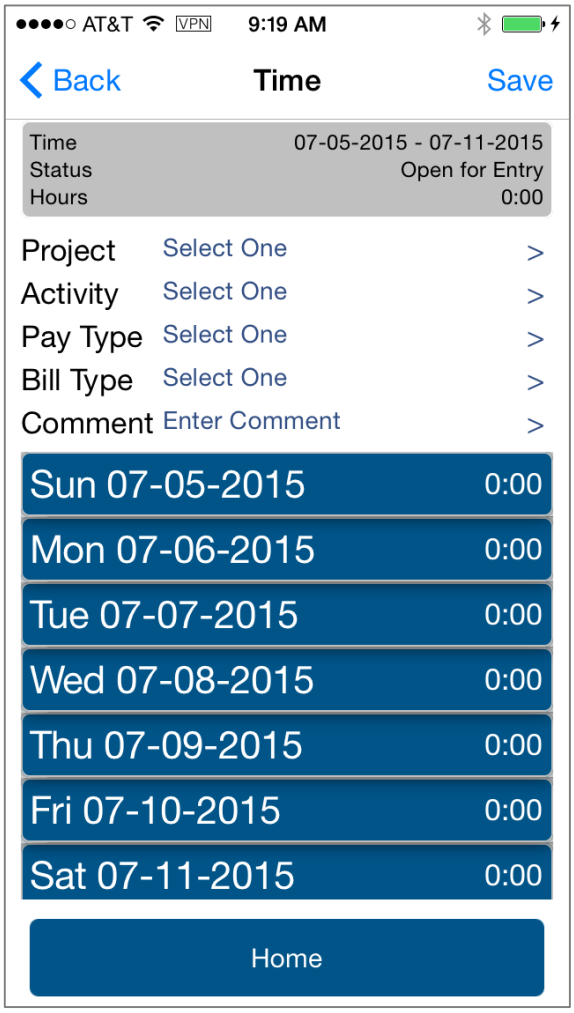
You have the following options on this screen:

- **Create new time entries** – click on any day to create a new entry
- **Edit existing time entries** – click on the existing entry summary to edit it
- **Use memorized entries** – if you have created memorized entries in the browser, you will see these entries for selection when creating new time entries
- **Attach pictures from your phone** – click on the Attachments link when creating or editing an entry to attach a picture from your device
- **Navigate to a past or future timesheet** – double arrow icons at the foot of the screen allow you to view past and future periods
- **Return to the current timesheet** – the Today button returns you to the current timesheet
- **Submit the timesheet you are viewing** – the Submit link at top of screen is available if the timesheet is open and subject to approvals
- **Return to Home screen** – the Home button returns you to the main screen

If you need to create a new entry, you will be directed firs to a list of memorized entries if have any. You can click on one of these entries to use it to create a new entry.



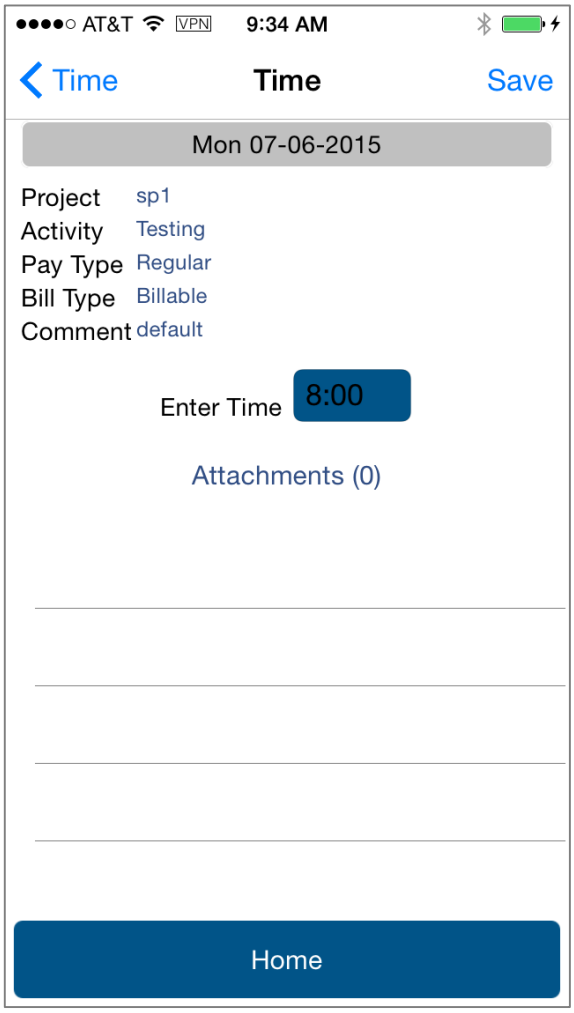
If you do not have any memorized entries or don’t want to use one of them, you can go on to a blank entry screen by clicking on the New button where you can add all of your time entry details. You can then click on each field to add the required information.



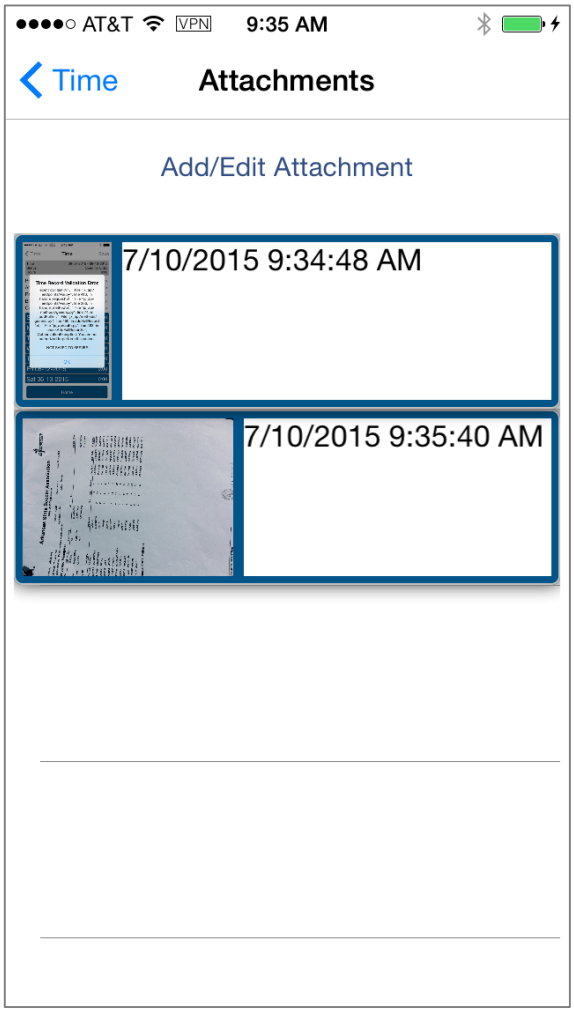
The fields that require selection provide a list of available options for choosing your time entry values. As is the case in your browser-based timesheet, the project selections and dependencies for other time entry fields are specific to your account and what you are able to see. All of the selection fields also include the ability to search for specific values based on name.

After you select your project and other field values in the selection lists, click the day for which you want to enter time. You can come back to your selections and enter time for additional days before saving the final entries.

After selecting values for your time entry and clicking on a specific day, you will enter the number of hours for the new entry. By default, your entry will be set up for 8:00 hours. However, you can change the amount by clicking on the hours field and selecting a different amount of time.



You can also include attachments for this specific time entry by clicking on the attachments link and either selecting a photo from the device gallery or taking a picture. After you are finished adding hours and attachments, you will click on the Save link in the upper right corner to return to the selection screen where you can enter time against the same entry for other days. Your new entry will not be saved yet.



After you have entered your selections, hours for any days and attachments (optional), click on the Save button in the upper right corner to save the new entry to your timesheet. The app will confirm that entry has been saved and return you to the current timesheet view.

The process for editing existing entries is the same as creation of a new entry except that you must click on the existing entry itself to make changes to the hours, dates and/or selections. You can also use existing entries to add hours for the same work on another day (e.g., clicking on an entry for "Support" on Monday will also allow you to add more hours to the same project for other days in the period).

The Submit button allows you to submit your timesheet for approval if your timesheet is subject to period or project approval plans. As is the case with your browser-based timesheet, you will not be able to edit a timesheet that has been submitted and/or approved. However, you can view submitted and/or approved timesheets in the app.

If you are assigned to an Allocation Time Entry screen where you enter your in and out times manually, you may have to add these in/out times in the browser before you can submit your timesheet using the mobile app.

Using My Expenses and My Custom Entry

The process for adding and editing expense and custom (a/k/a mileage) entries is the same as the time entry process. The only difference is that the amounts are entered in decimal format rather than HH:MM for time. You can enter mileage on My Expenses if your system is set up for it. Both expense and custom entry also include the attachments feature.

Using Punch In/Out

If you have access to track punch times in the mobile app, the Punch In/Out button will take you to a screen where you can punch in and out. When you click on the Punch In link, it logs an "in" time based on your device clock time and changes to the "Punch Out" option. When you click on "Punch Out", it logs the "out" time and switches back to the "Punch In" option. These in and out times are populated in your allocation time entry screen and can be viewed in the browser. The punch button also includes information on your punch activity for the current day.

Using Refresh Data

Any data that you add via the mobile app will automatically be synced with the Journyx server provided you are connected to a network when you add it. It is possible to use the mobile app when a network connection is not available. If you add data while offline, it will be synced with the Journyx server as soon as you save new data when a network connection becomes available. The primary reason to run Refresh Data is to sync data entered while offline or pull new information from the server. For example, you might need to sync with the server because you entered some time recently in the browser. You might also need to sync with the server to get access to new projects that have been assigned to you. Running Refresh Data periodically (e.g., weekly) will ensure that you have access to your current projects when entering time and expenses in the mobile app.